



DRAFT - For Discussion Purposes Only



| Functional Competency | Definition |
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| | <ul style="list-style-type: none">• Demonstrates skill in working with vendors to lower the costs associated with technology and processes |
| Customer Service Support (Customer Service and Support Call Center, Application Processing, Student Credit Management) | <ul style="list-style-type: none">• Demonstrates understanding of SFA's service standards and engages in behavior to encourage customer satisfaction• Proactively anticipates customer needs• Uses tools and available information effectively to build insight into customer needs for insightful, integrated interactions• Provides superior customer responsiveness that meets or exceeds service expectations• Demonstrates the ability to develop an in-depth understanding of a customer's unique challenges, needs and wants in order to build effective relationships• Demonstrates the ability to respond effectively to customer complaints and solve customer problems• Integrates resources, services and technical capabilities across SFA units to meet customer needs• Communicates, accepts and assimilates different perspectives, approaches and backgrounds to reach customer satisfaction goals |
| Legal (Application Processing, Student Credit Management) | <ul style="list-style-type: none">• Demonstrates an understanding of general legal principles, laws and jurisprudence• Demonstrates the ability to use the legal understanding to make decisions that impact the organization• Demonstrates skill in handling resolutions, pleadings and other legal documents in relation to cases• Demonstrates the ability to represent SFA, and ED where necessary, in matters involving the Office of Inspector General, the General Accounting Office, the Department of the Treasury, other Federal and state agencies, and the Office of Management and Budget, when credit management and debt collection are the subject |
| Office Administration (Immediate Office) | <ul style="list-style-type: none">• Utilizes knowledge of administrative concepts and practices (answering phones, filing, scheduling, etc.) to plan, deliver and manage support services vital to running SFA's office operations |



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| Planning and Budgeting <i>(Immediate Office)</i> | <ul style="list-style-type: none"> • Demonstrates an overall understanding of the planning and budgeting process • Demonstrates knowledge of the overall rules, sources of information and tools available to prepare and consolidate budgets and forecasts • Demonstrates the ability to apply planning and budgeting concepts to ensure accurate and timely reporting of business forecasts and budgets to predict revenues and spending actively • Analyzes and discusses budget implications |
| Portfolio Management <i>(Student Credit Management)</i> | <ul style="list-style-type: none"> • Defines basic portfolio management terminology • Demonstrates ability to structure, monitor and maintain investments to ensure maximum returns |
| Product Knowledge <i>(Customer Service and Support Call Center, Aid Awareness, Student Credit Management)</i> | <ul style="list-style-type: none"> • Demonstrates an understanding of SFA's programs and products • Demonstrates the ability to remain current on products and program guidelines • Demonstrates ability to identify and access communication vehicles that describe SFA's products • Demonstrates ability to apply product knowledge to resolve customer questions and/or problems |
| Public Awareness (Marketing) <i>(Aid Awareness)</i> | <ul style="list-style-type: none"> • Plans and executes public awareness events that communicate to target customers the strategic and brand image goals while maximizing profitability and value • Demonstrates the ability to produce communications materials |
| Policy, Regulation and Legislation Awareness <i>(Application Processing, Student Credit Management)</i> | <ul style="list-style-type: none"> • Demonstrates an understanding of the general policies, regulation and legislation principles, laws and jurisprudence • Interprets and applies policy, regulation and legislation knowledge appropriately to recommendation within the financial practices |



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| Research and Analysis (<i>Aid Awareness</i>) | <ul style="list-style-type: none">• Demonstrates an understanding of basic research concepts, principles and methods• Demonstrates an understanding of specific information sources and methods of information gathering to make fact-based decisions• Utilizes skills in assessing and evaluating information to identify trends and potential issues• Demonstrates ability to collect and validate internal and external data and provide analytical support by drawing conclusions from the information |
| Service Operations Knowledge (<i>Application Processing</i>) | <ul style="list-style-type: none">• Demonstrates an understanding of the application process• Demonstrates the ability to apply process understanding to verifying aid application information, creating aid reports and packages for students and schools |
| Technical Assistance (<i>Customer Service and Support Call Center, Application Processing, Student Credit Management</i>) | <ul style="list-style-type: none">• Demonstrates an understanding of the importance and impact of customer support on customer satisfaction and applies the appropriate customer support principles• Demonstrates skill in providing complete, accurate and real-time support to customer inquiries• Identifies customer needs and develops and implements the appropriate training/education programs to serve the customer |
| Technology Planning (<i>all areas</i>) | <ul style="list-style-type: none">• Keeps informed of emerging technologies and business process innovations to analyze their potential for streamlining SFA operations• Gathers and evaluates business process and technical requirements to identify service improvement and cost reduction opportunities |